



THE MUSICAL LEGACY SOCIETY

Private and Confidential Planned Gift Statement of Intent

The undersigned verifies an existing planned gift, naming the Milwaukee Symphony Orchestra, Inc. or the Milwaukee Symphony Orchestra Foundation Trust in the gift instrument. The undersigned represents that s/he/they has no present intention to revoke the gift prior to death and would do so only if unexpected circumstances arise.

The undersigned certifies that s/he/they will provide the Milwaukee Symphony Orchestra with a deferred gift to take effect upon the death of the undersigned or at another time indicated by the undersigned, in the approximate amount of \$\_\_\_\_\_ (optional).

\_\_\_\_\_  
Name (s) (As you wish to be listed in concert programs.)

\_\_\_\_ I/We prefer to remain anonymous

\_\_\_\_\_  
Address City State Zip Code

\_\_\_\_\_  
Phone

Nature of gift: \_\_\_\_\_

(Examples: will, bequest, charitable trust, IRA, life insurance policy, annuity, qualified benefit plan, real estate, other real property, direction to private foundations, etc.)

Name and address of law office or financial institution managing your planned gift. \_\_\_\_\_

Purpose of the gift:

Endowment: \_\_\_ artistic excellence, \_\_\_ performance, \_\_\_ guest artists, \_\_\_ education, \_\_\_ special initiatives such as commissioning, recording, and touring

Current Operations: \_\_\_ artistic excellence, \_\_\_ performance, \_\_\_ guest artists, \_\_\_ education, \_\_\_ special initiatives such as commissioning, recording, and touring

Wherever the need is greatest: \_\_\_\_

Thank you for helping to ensure music for our future and for future generations.

Dated: \_\_\_\_\_ Signature(s): \_\_\_\_\_

\_\_\_\_\_

